

Initiating and Navigating the Request for Proposal Process

**GENERAL SERVICES DIVISION
DEPARTMENT OF ADMINISTRATION
STATE OF MONTANA**

OCTOBER 2003

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**Periodic updates to this manual will be found at our website.
The fourth version was published in June 2002.**

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GUARDIANS OF PUBLIC TRUST

*“Money is of no value; it cannot spend itself.
All depends on the skill of the spender.”*

– Ralph Waldo Emerson
1803-1882

The spending of public tax dollars is an issue close to everyone’s wallet. An effective public procurement program reduces the cost of government and directly improves the quality and timeliness of services rendered by state agencies. For agencies, procurement is a service function, supporting programs by the acquisition of supplies and services. For potential offerors, it is an opportunity to provide supplies and services to government agencies.

Operating under the authority of the Montana Procurement Act, the Department of Administration has the responsibility of developing and administering a fair, legal, cost-effective procurement program. To meet this responsibility, the Department’s goals are:

- ❑ To recognize our obligation to the taxpayers, the using agencies, and the offerors to institute and maintain an effective and economical program for purchasing supplies and services.
- ❑ To obtain the needed supplies and services at favorable prices without compromise of suitability, appropriate quality, and reliable offeror performance.

THE TOOLS

In order to facilitate the procurement of supplies and services for public entities, the Montana Procurement Act provides certain tools for agencies to use to obtain the desired products. These tools are outlined in Title 18, chapter 4, of the Montana Code Annotated (MCA).

These tools are:

- ✓ Invitation for Bid
- ✓ Request for Proposal
- ✓ Small Purchase
- ✓ Limited Solicitation
- ✓ Sole Source
- ✓ Exigency Purchase

In addition, the State has enhanced several of these tools with:

- ✓ Term Contracts
- ✓ Requisition Time Schedule
- ✓ Cooperative Purchasing Agreements
- ✓ Pre-Qualification of Vendors

While most of these procurement options are fairly straightforward, the Request for Proposal process is a tool that has continued to evolve since its enactment in 1983. Later legislatures and court rulings have continued to modify and define the RFP process. At its heart, however, is the premise that agencies need a procurement tool where factors other than price, such as service capabilities or technical components, may need to be considered.

WHO'S WHO?

Bidder? Offeror? Vendor? Which is which?

Bidder: A seller who submits a *bid* to an Invitation for Bid.

Offeror: A seller who is offering a *response* to a Request for Proposal.

Vendor: A seller of supplies or services.

WHAT'S WHAT?

GSD: General Services Division, Department of Administration

SPB: State Procurement Bureau, General Services Division

Invitation for Bid: A written description that completely describes what the State wants and no negotiations are necessary or permitted. Award is made solely on the basis of the lowest cost. Usually used for the purchase of supplies and equipment.

Request for Proposal: The needs of the State may not be completely clear, negotiations may be necessary, and/or cost is just one of several criteria necessary to make a

decision. Usually used for the purchase of services and information technology systems.

WHAT IS A REQUEST FOR PROPOSAL?

A Request for Proposal (RFP) is a formal invitation to a potential offeror to submit a proposal to provide a solution to a problem or a need that the agency has identified. An RFP is also a procurement process where the State has the ability to judge if an offeror's qualifications, experience, and approach will provide the best solution to the State's needs.

WHEN IS AN RFP USED?

- When the agency has defined a need and requests the offerors to propose the best method for accomplishing it;
- The agency will consider factors other than lowest price when determining whether to make an award;
- When the skills, expertise, or technical capability of the offerors will be evaluated;
- When the problem or need is fairly detailed or complex;
- The problem or need involves services or a combination of supplies and services;
- When the State may need the opportunity to ask offerors to clarify their proposals by issuing questions, or to revise their proposal through a best and final offer process; or
- Where specifications of the project cannot be clearly defined.

If your project fits any of these situations, then an RFP is most likely the procurement tool for you to utilize. Most RFPs are a direct result of an agency's desire to secure a supply or service without being limited to simply a low bid option.

PROS AND CONS OF THE RFP

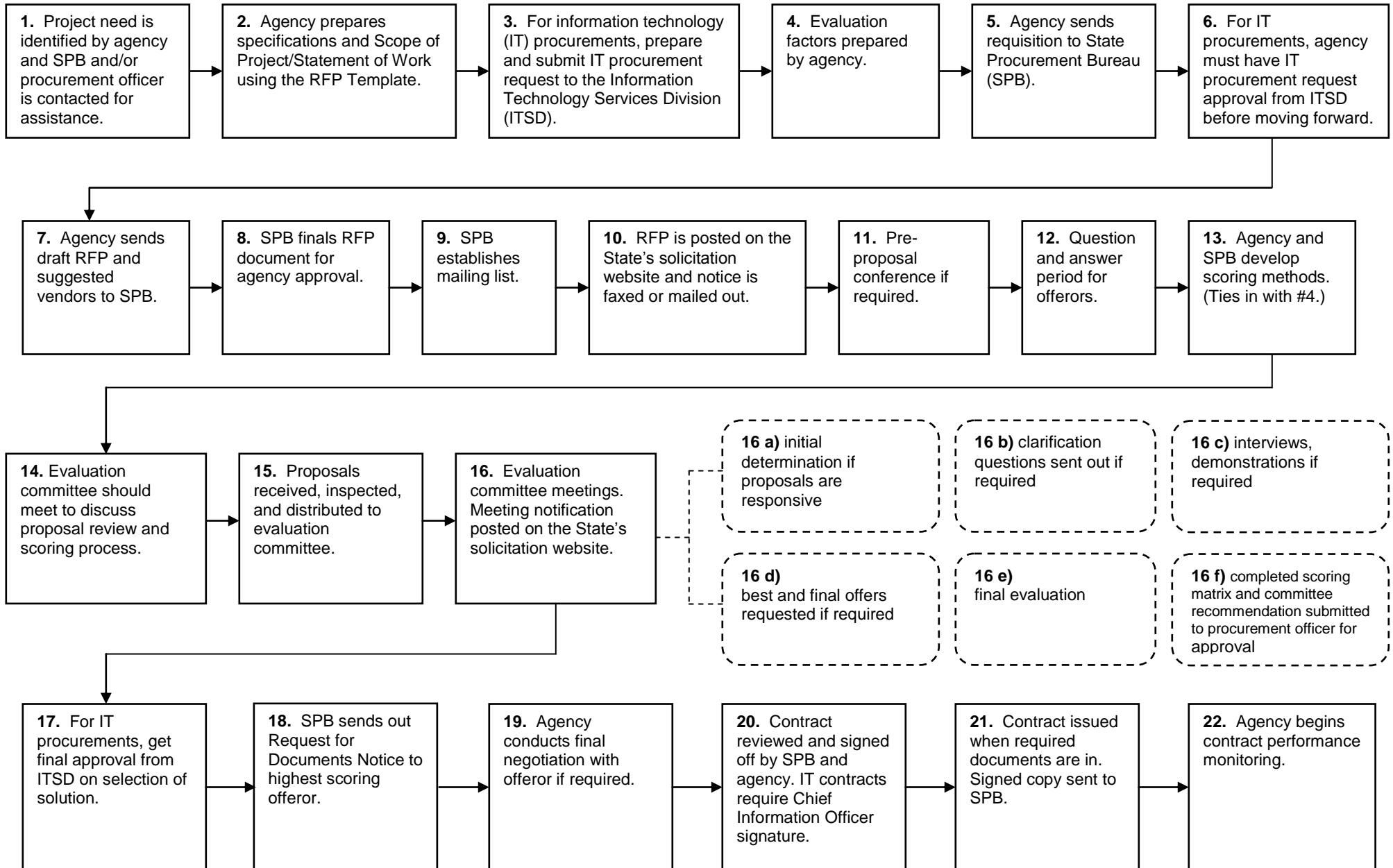
Some of the advantages of using an RFP can be:

- **Creative Competition.** The RFP process exposes the problem/need to a competitive solution. The competitive process promotes quality and generally results in lower prices, more value, greater flexibility in approaches, and more creative solutions.
- **All Things Considered.** The RFP process does not confine the selection process into the lowest possible price; but rather allows for a comprehensive evaluation to usually complex problems.
- **Clear Information.** The RFP process keeps the playing field level by ensuring that all potential offerors get the same information. Getting the problem down in writing is the only way to be certain that potential offerors get the same information. It also will better protect the agency from a protest during the contract award phase.
- **Clear Solutions.** Preparing the RFP forces the agency to really think about what it wants. Sometimes a problem seems so obvious that it is easy to assume that everyone understands the needs. By going through the RFP process, the agency will be forced to define its needs in sufficient detail to allow potential offerors to provide realistic solutions at affordable prices.
- **Straight Format.** By requiring offerors to conform to the format specified in the RFP, the agency will be better able to evaluate the proposals, without wasting time searching for information.
- **Fair Evaluations.** Formalizing the requirements and the selection process produces better results. Having predetermined evaluation criteria simplifies the selection process and ensures all offerors are evaluated fairly.

The major disadvantage of using an RFP can be:

- **Major Time Commitment.** The RFP process requires extensive time to define the requirements, prepare the RFP document, establish the evaluation process, perform the evaluations, and justify the award.

THE REQUEST FOR PROPOSAL PROCESS



THE REQUEST FOR PROPOSAL PROCESS

An RFP requires a multitude of steps – each one building toward the eventual awarding of a contract. Some of the steps are optional, depending on the nature of the project. Agencies should contact their agency purchasing officer or the State Procurement Bureau (SPB) early in the process and rely on the procurement officer assigned to their project to guide and assist them in making decisions on optional portions of the RFP process.

Initiate the Project

- Define the project goals.
- Develop a plan for reaching the goals.
- Evaluate if an RFP is the best procurement tool to use.
- Obtain necessary management approvals.
- Organize the manpower to carry out the RFP process.
- Submit a requisition to SPB.

Establish the Core Requirements

Write the core of the RFP, including every specification you want to score.

- Incorporate all special legal requirements (special licenses, certifications, etc.).
- Determine minimum standards that will be acceptable (pass/fail, must/may).
- Determine any special terms and conditions.
- Establish budgetary constraints.

Establish the Evaluation Criteria

WHAT ARE EVALUATION CRITERIA?

Evaluation criteria are the factors an agency uses to determine which of several competing proposals submitted in response to an RFP would best meet the agency's needs. In establishing effective evaluation criteria, an agency must clearly identify the factors relevant to its selection of a contractor and then prioritize or weigh these factors according to their importance in satisfying the agency's needs in the procurement. Together, the proper identification and weighing of the evaluation criteria will form an evaluation plan that will provide the agency with a common standard by which to judge the merit of competing proposals. This allows the agency to rank the proposals received while simultaneously providing offerors with a fair basis for comparison. As importantly, when evaluation criteria are properly selected and weighed, the proposals received will accurately reflect the offeror's understanding of the solicitation and the offeror's ability to deliver what the agency needs.

Establish how the proposals will be evaluated:

- Identify the major criteria that are critical for the success of the RFP.
- Commonly used criteria are:
 - Qualifications
 - Relevant experience
 - Quality of work
 - References
 - Service
 - Physical facilities
 - Human resources
 - Cost
 - Technical Capabilities
 - Proposed Timelines

TIPS TO KEEP IN MIND:

- RFPs can *only* be evaluated on the stated criteria...so include everything you want to measure.
- The evaluation criteria must be in terms that can be measured and evaluated – avoid words that are subjective, arbitrary, or too general.

Detail how much each criterion is worth.

- Each section may be stated in the form of specific points or a percentage.
- The importance of each criterion and the weight given to each criterion will largely depend on what the agency desires from the resulting contract.
- Cost does not have to be a factor, but it is rare that it will not be considered. Budget constraints may help determine the weight of the cost portion.
- Time constraints may result in increase weight for the ability and the guarantee of the contractor to complete projects by specified dates.

Include the information in the RFP.

- Explain in the RFP how points will be awarded.

EVALUATION CRITERIA: HOW MUCH DETAIL?

Identify the major criteria that are critical to the success of the RFP. In most cases, this should correspond to the Offeror Informational Requirements set out Section 4.1 of the RFP. However, in some instances, the major criteria are set out in Section 3, the Scope of Work section of the RFP. Some commonly used criteria are: qualifications, relevant experience, quality of work, references, service, physical facilities, human resources, cost, technical capabilities, industry standards and proposed timelines. RFPs can only be evaluated on stated criteria, so include everything to be measured and ensure that the criteria are measurable. Once you have determined the major categories, reference those sections of the RFP that set out the specific criteria that will be evaluated and determine point assignments. Use the following as an example:

References		Pass/Fail
Category	Section of RFP	Point Value
A. References Included with Offeror's Response	4.1.1	Pass/Fail

Resumes/Company Profile and Experience		____% of points for a possible 30 points
Category	Section of RFP	Point Value
A. Years of Experience	4.1.2	10
B. Applicability of Experience with Private/ Public Sector	4.1.2	10
C. Staff Qualifications	4.1.2	10

Method of Providing Services		____% of points for a possible 40 points
Category	Section of RFP	Point Value
A. Methods	4.1.3	10
B. Work Plan	4.1.3	20
C. Reporting Methods	4.1.3	10

Financial Stability		Pass/Fail
Category	Section of RFP	Point Value
A. Financial Stability	4.1.4	Pass/Fail

Cost Proposal		____% of points for a possible 30 points
Category	Section of RFP	Point Value
A. Cost Proposal	5.0	30

NOTE: A Sample Scoring Guide is available on the GSD website at: <http://discoveringmontana.com/doa/gsd/procurement/rfpprocess.asp>. The Scoring Guide is an excellent tool for defining scoring assignments and it should be included in the RFP.

HOW DO YOU SCORE PRICE?

There are several different methods to award points based on the cost set out for each proposal. If cost is included as one of the evaluation factors for a RFP, then there must be some way to convert the dollar amount into a score, or awarded points. The SPB suggests the following methods for scoring the cost portion of an RFP response.

1. Ratio Method.

With this method, the proposal with the lowest cost receives the maximum points allowed. All other proposals receive a percentage of the points available based on their cost relationship to the lowest. This is determined by applying the following formula:

$$\frac{\text{Lowest Cost}}{\text{Cost Being Evaluated}} \times \text{maximum points available} = \text{awarded points}$$

Example: The cost for the lowest proposal is \$100,000. The next lowest proposal has a cost of \$125,000. The total points available for cost = 100 points.

$$\frac{\$100,000}{\$125,000} = .80 \times 100 = 80 \text{ points}$$

2. Best Value Method.

In this method, all factors, except cost, are considered and scored according to the established criteria. Once this is completed, the cost evaluation is completed by dividing the total points awarded to each proposal by its proposed cost. In this method, a value is presented in the form of a cost per point. The proposal with the lowest cost per point represents the best value to the State and would receive the award. When using this method, the SPB suggests establishing a minimum acceptable score each proposal would have to achieve in order to move forward in the process. Proposals that do not meet the minimum level would not advance to the final evaluation step.

Example:

Category	Proposal A	Proposal B	Proposal C
Technical	400	590	700
Qualifications	240	280	230
Total Points	640	870	930
Cost	\$100,000	\$125,000	\$150,000

(continued on next page)

Proposal	Cost	/	Points	=	Cost per point
A	\$100,000		640		156
B	\$125,000		870		144
C	\$150,000		930		161

Proposal B would received the award because it provides the lowest cost per point, or best value to the State.

3. Two Step Method.

The Two Step Method is designed to reward the lowest cost proposal that meets specific qualifications. This is accomplished by first specifying the criteria that will be used to determine a “Qualified Proposal.” Typically, a proposal is deemed qualified if it has passed all minimum criteria or scores established, and is within a certain percentage of the top scoring proposal, typically within 10 to 15 percent. All proposals that meet these criteria are deemed qualified, and the proposal with the lowest cost would receive the award.

Example:

A proposal will be considered to be a “Qualified Proposal” if it meets the following criteria:

- a. The proposal has achieved a passing score for all parts; and
- b. The total point score for the proposal is greater than or equal to 90 percent of the highest scoring proposal.

All proposals meeting these criteria will be determined to be a “finalist.” The finalist proposal that results in the lowest cost to the State will receive the award.

Select an Evaluation Committee

- Select a group of subject matter experts.
- Explain time commitment.
- Explain potential conflict of interest issues.
- Have each committee member obtain necessary supervisory approval for participation and time commitment.
- Select committee chairperson.
- Decide if subcommittees will be used.

Submit Required Materials to the Procurement Officer

Items to be submitted include:

- Completed requisition.
- Electronic copy of the RFP in WORD format, Arial font.
- List of potential offerors for mailing list, if available.
- Name and phone number of committee chairperson.
- Names of committee members, if available.
- Proposed closing date (Rule of thumb: Closing dates should be at least 30 days after the release date of the RFP).

Note: *Two weeks please! For solicitations handled by the State Procurement Bureau, the package of materials should be delivered at least two weeks in advance of the desired RFP release date.*

Final Preparation of the RFP

To prepare the RFP for release, the procurement officer will:

- Add any additional required information;
- Review RFP for compliance with laws, rules, and policies;
- Final the mailing list of potential offerors; and
- Establish the final project schedule with the project contact person.

Issue the RFP

To issue the RFP, the procurement officer will:

- Mail or fax a *notice* of the RFP to a list of up to 25 potential offerors; and
- Post the RFP to the State's website:
<http://discoveringmontana.com/doa/gsd/osbs/default.asp>.
- On special request of the agency, the State Procurement Bureau will mail *copies of the entire RFP* to a list of up to 25 potential offerors. Agencies desiring to mail the entire document to more than 25 offerors or to send a notice to more than 25 potential offerors must pay for the additional printing and mailing costs.

Pre-proposal Conference (Optional step)

- If desired, the project contact person may conduct a face-to-face or conference call pre-proposal conference for potential offerors. This conference may either be *mandatory* or *optional* for the offerors to attend and must be stated as such in the RFP.
- The committee chairperson and the procurement officer will conduct the pre-proposal conference.
- Agencies may choose to record the conference, but it is not required.
- A sign-in sheet should be collected at the conference.
- Attendees must be aware that any oral responses to questions at a pre-proposal conference are not binding until reduced to writing.

Questions and Answers

- Typically, potential offerors are provided an opportunity to submit written questions concerning the RFP. A specific deadline for submission of questions must be set in the RFP.
- Questions are submitted to the procurement officer and forwarded to the project contact person.
- The project contact person prepares answers and submits them to the procurement officer for review.
- The procurement officer posts the information to the State's website as a formal addendum by the stated deadline.

WHEN SETTING DEADLINES FOR CLARIFICATION QUESTIONS...

When setting the deadline for questions, be sure you allow enough time for:

- offerors to have received and read the RFP;
- the project contact person to provide thoughtful answers to the questions;
- the issuance of an addendum providing the written questions and answers; and
- enough time before the deadline for receipt of proposals for the offerors to incorporate the information from the addendum into their proposals.

Final Preparation of Evaluation Process

- Prior to the deadline set for receipt of proposals, the RFP evaluation committee must make the final preparation for the evaluation process. Items to be completed include: a detailed score sheet, schedule of evaluation process, and decision on scoring method.
- The completed evaluation process must be submitted to the procurement officer for review.
- Distribution of the proposals to the evaluation committee will not take place until the final evaluation matrix has been approved by the procurement officer. See page 43 for sample scoring matrices.

Receipt of Proposals.

- The procurement officer must receive proposals by the designated deadline. *Late proposals will not be accepted, regardless of cause.* Late proposals will be destroyed or returned to the offeror at the expense of the offeror.
- The proposals will be available for public inspection: (1) after the formal due date; (2) after trade secret or other confidential information has been removed; and (3) after the procurement officer has approved the evaluation matrix and/or scoring methodology submitted by the evaluation committee.

HOW LATE IS LATE?

Any proposal not received by the designated time and date at the designated final destination will be rejected as late. Even if the proposal is only one minute late, it will be rejected regardless of cause.

Inspection of Proposals for Trade Secrets or other Protected Materials

- Upon receipt of proposals, the procurement officer will examine the proposals for any claims of trade secrets, including the required affidavit, or other protected materials.
- If such contents are present and valid, the procurement officer will remove the protected materials and make the rest of the proposal available for public inspection.
- The evaluation committee will receive its required copies, including the protected materials, after the procurement officer has discussed the implications of the presence such materials with the committee chairperson.
- Advice from agency legal counsel may be necessary in determining the validity of the trade secret claims.
- If a trade secret claim is submitted without the required affidavit, the offeror may be contacted and provided the opportunity to *either withdraw* the proposal *or release* the information for public inspection.
- If the trade secret claim is found to be invalid by agency legal counsel, the offeror will be contacted and provided the opportunity to *either withdraw* the proposal *or release* the information for public inspection.

TRADE SECRET OR PROPRIETARY INFORMATION??

According to Montana law, only “trade secrets” meeting the test of the “Uniform Trade Secrets Act,” Title 30, chapter 14, part 4, MCA, are *not* open to public inspection. (Mont. Code Ann. § 18-4-304.) All other information included in a response to an RFP, including what businesses typically refer to as “proprietary business information” is open for public inspection. Offerors claiming trade secret status for parts of their responses must fill out a special affidavit *and* clearly mark and separate out any bona fide trade secret material.

The Trade Secret Affidavit is available on the GSD website at:
<http://discoveringmontana.com/doa/gsd/procurement/forms.asp>.

Distribution of RFPs

RFPs will be distributed to the evaluation committee once:

- The procurement officer has reviewed and approved the agency’s completed evaluation plan; and
- The procurement officer and the committee chairperson have discussed all issues of trade secret claims as necessary.

Non-conflict of Interest Forms

- Once the proposals have been received and it is clear which companies are involved in the RFP, each member of the evaluation committee must fill out a “Non-conflict of Interest” form. Either the committee chairperson or the procurement officer will distribute these forms to the committee members.
- If there is any question about a potential conflict of interest, legal counsel should be consulted.
- These forms must be signed, collected, and returned to the procurement officer prior to the beginning of the evaluation process.
- The “Non-conflict of Interest” form may be found on the GSD website at:
<http://discoveringmontana.com/doa/gsd/procurement/forms.asp>.

Confidentiality Statement

- If materials are received as part of the RFP process that are protected from public view under the provisions of section 18-4-304, MCA, the procurement officer will provide the evaluation committee members with a “Confidentiality Statement.”
- This form informs evaluation committee members that they must maintain the confidentiality of these documents during and after the RFP evaluation process.
- Release of confidential information may lead to disciplinary action or monetary damages against any individual who fails to keep the information confidential pursuant to section 2-2-136, MCA.
- These forms, along with any confidential material, must be signed, collected, and returned to the procurement officer prior to the beginning of the evaluation process.
- The “Confidentiality Statement” form is located on the GSD website at: <http://discoveringmontana.com/doa/gsd/procurement/forms.asp>.

Proposal Evaluation Process

- Prior to the initial scoring of the proposals, the evaluation committee should meet to discuss the proposal review and scoring process. Each committee member should have a clear understanding of the scoring process and how points will be assigned.
- Proposals should be distributed and reviewed individually by committee members. Committee members must be given sufficient time to read and evaluate each proposal prior to meeting as a group to score the proposals.
- Any questions regarding the scoring process should be addressed to the procurement officer or committee chairperson.

WHAT IS A “RESPONSIBLE OFFEROR”?

A responsible offeror means a person who has the capability in all respects to perform fully the contract requirements and the integrity and reliability, which will assure good faith performance. (Mont. Code Ann. § 18-4-301(8).)

RESPONSIVE OR NON-RESPONSIVE??

One of the first steps of every evaluation process is to determine if the proposals are “responsive or non-responsive” to the Request for Proposal. “Responsive” means that the proposal conforms in all material respects to the Request for Proposal. The evaluation committee will make the initial determination of whether a proposal is responsive. This determination is subject to change as information is revealed during the course of the evaluation process or anytime up to contract execution and must be corroborated by the procurement officer. The procurement officer has the final authority to find a proposal non-responsive.

What determines if a proposal is non-responsive?

At times, an evaluation committee may determine that a proposal simply does not warrant further consideration because of the inadequacy of the submitted proposal and will proceed to deem these proposals “non-responsive” with the concurrence of the procurement officer. *However, extreme care should be used when making this decision because of the time and cost that a potential offeror has put into submitting a proposal.* Proposals may be deemed “non-responsive” for the following reasons:

- If any of the required information is not provided;
- If the submitted price is found to be excessive or inadequate as measured by criteria stated in the RFP; or
- If the proposal is clearly not within the plans or specifications described and required in the RFP.

What determines if a price listed in an RFP is “excessive”?

As stated, a proposal may be found to be non-responsive due to excessive cost if the proposed price does not meet the criteria defining “excessive” in the RFP. This could be accomplished by options such as:

- Explicitly stating a budget or budget range in the RFP; or
- Stating an objective method clearly defining how proposals could be eliminated due to price.

Is there anything a potential offeror can do to make their non-responsive proposal “responsive”?

No. Proposals must be accepted “as is” by the evaluation committee and the initial screening must be conducted on that basis. The committee has the option of later requesting clarification information or a best and final offer, but only if the proposal was initially found to be “responsive.”

Evaluation Committee Meetings

Once the proposals have been evaluated and scored by individual committee members, the next step is for the entire committee to get together to discuss the proposals and arrive at the final scoring. At this point, several things must be kept in mind:

- Meetings of an evaluation committee that involve an evaluation process or competing offers where the award of a contract is being considered must be electronically posted to the State's solicitation website 72 hours in advance of the meeting.
- Minutes must be kept of each meeting.
- A quorum of the committee must be present to take any official actions.
- The meetings must take place in an ADA accessible location.
- All members of the public are welcome to attend the evaluation committee meeting, however, they may not participate in the evaluation process or offer any comments. When sections of the proposals involving confidential materials are discussed, the meeting must be temporarily closed to the public.
- A master-scoring sheet should be compiled with the total score for each proposal.

OPEN FOR PUBLIC INSPECTION?

The "right to know" provision of Montana's Constitution, Article II, § 9, and section 18-4-304, MCA, allow the contents of submitted proposals to be open to public inspection, including competing offerors and the media, shortly after the time set for the receipt of proposals once the procurement officer has had the opportunity to inspect the proposals and remove any materials protected from public disclosure, i.e., trade secret materials. In addition, all meetings involving the evaluation of RFPs, are open to the public and subject to the open meeting laws. Agencies should review the latest version of the "Questions and Answers on the RFP Process" on the GSD website at: <http://discoveringmontana.com/doa/gsd/procurement/rfpprocess.asp>. This list of questions and answers is updated as additional issues are added.

CAN A COMMITTEE RECEIVE EVALUATION ASSISTANCE FROM OUTSIDE OF THE COMMITTEE MEMBERSHIP?

Yes. If technical assistance will enhance the decision-making of the committee, outside assistance should be used. However, only committee members may assign or vote on points.

Clarification Process (Optional step)

- The committee may choose to seek written clarification from particular offerors. A time and date for receipt of clarifications should be set.
- The procurement officer will issue any clarification questions. Responses will be returned to the procurement officer and submitted to the evaluation committee.

TIPS FOR HANDLING THE CLARIFICATION PROCESS

- Formal questions asked of offerors as part of the clarification process become a permanent part of the official procurement file; and
- It is important to establish a deadline beyond which answers to these questions will not be accepted.

Oral Presentations/Interviews/Discussions (Optional step)

- The committee may choose to ask certain offerors to make an oral presentation to the committee.
- Oral presentations by offerors must be open to the public and must be noticed to the public at least 72 hours in advance of the presentation.
- All offerors must be afforded equal time in making their presentation.
- Time slots for oral presentations should be established by the drawing of lots.
- Interviews are to be conducted and controlled by the committee chairperson. The procurement officer may attend such presentations if deemed necessary.
- All members of the evaluation committee should be present at the oral presentations.
- If oral presentations/interviews are anticipated at the outset of the RFP process, include anticipated dates, evaluation criteria and scoring methodology in the RFP.
- If a decision to hold oral presentations/interviews is made during the RFP process, the evaluation must be based solely on existing stated criteria with scores adjusted accordingly.

Site Visits (Optional step)

- The committee may choose to visit the offerors' work sites.
- Site visits must be open to the public and must be publicly noticed at least 72 hours in advance if a quorum of the evaluation committee will be attending. Offerors must be notified in the RFP that site visits may be conducted and that the visits must be open to the public if a quorum of the evaluation committee will be attending.
- If the option of requiring a site visit is pursued, evaluation criteria and/or scoring methodology must be set out for scoring the site visit in the RFP.

Best and Final Offers (Optional step)

- The committee may decide to seek best and final offers from one or more offerors if additional information is necessary or responses will be altered in order to make a final decision.
- The committee may request only one best and final offer.
- Offerors may not request an opportunity to submit a best and final offer.
- The procurement officer must be notified of the offerors who are provided the opportunity to submit best and final offers and the areas to be addressed.
- The procurement officer will send out the request for best and final offers in a letter stating the areas to be covered and the date and time in which the best and final offer must be returned.
- Proposal scores are *adjusted* in light of the new information received in the best and final offer. Additional points cannot be given.
- A best and final offer cannot be requested on price/cost alone unless so stated in the RFP. (ARM 2.5.602.)

References

- Prior to the final evaluation, references should be checked if requested in the RFP.
- The State retains the right to find the proposal non-responsive based on negative references alone.

Final Evaluation and Selection

- Final evaluation must take into consideration all submitted information and must be completed *using only the evaluation criteria defined in the RFP*.
- Final committee scores must be documented in a scoring matrix.
- The highest scoring proposal must be selected unless the agency decides to cancel the entire RFP.

HOW SHOULD THE FINAL POINT ASSIGNMENTS BE TALLIED?

Committees have several options on how to tally their final point assignments: (1) consensus score; (2) a total of all of the points given by individual committee members; or (3) an average of the individual scores. ***The SPB strongly recommends the use of consensus scoring.***

Selection Recommendation

- The chairperson of the evaluation committee must submit a written recommendation of selection to the procurement officer *prior* to the announcement of the selection.
- The selection recommendation must describe the proposal evaluation process and justify why the highest scoring offeror was selected.
- Copies of the committee's master scoring sheets and information regarding non-responsive proposals must also be submitted to the procurement officer.
- The procurement officer must approve the committee's selection process prior to notification of the highest scoring offeror.

Request for Documents

- A letter will be sent by the procurement officer to each offeror indicating the outcome of the proposal evaluation process.
- A request for documents letter will be sent to the highest scoring offeror requesting the insurance, contract security and/or worker's compensation documents required by the RFP.
- Tentative contract award will be posted to the State's website the same day as the letters are sent out. Final contract award is dependent on the receipt of a purchase order or fully executed contract.

Contract Negotiation

- Contract negotiation may begin once the highest scoring offeror has been selected and the committee's selection process has been approved by the procurement officer. Negotiation is limited to such things as the specifics of the supplies or services contained in the RFP, payment schedules or project deadlines.

Document Gathering

- The procurement officer will work with the highest scoring offeror to collect all required documents such as Workers' Compensation, insurance requirements, contract security, contractor's license, etc.
- A contract may not be signed or purchase order issued until the procurement officer indicates that all required documents have been received and are valid.
- Work may not commence until a contract is fully executed or a purchase order is issued.

Contract Signing or Issuance of Purchase Order

- If a purchase order is used, the procurement officer will issue the purchase order to the highest scoring offeror and implementation of the project may begin.
- If a contract is used, the procurement officer must approve the contract language as to form and the document must include a procurement officer signature.

THE REQUEST FOR PROPOSAL FORMAT

The State Procurement Bureau has developed a format for agencies to follow when preparing an RFP. The basis for the format is the RFP Template posted on the GSD website at the following address:

<http://discoveringmontana.com/doa/gsd/procurement/rfpprocess.asp>.

Cover Page

Table of Contents

Offeror's RFP Checklist

Schedule of Events

- This subsection will answer several offeror questions in one concise table. However, be sure to use words like “tentative” or “anticipated” to maintain flexibility.
- The schedule should be as inclusive as possible, including:
 - ✓ RFP issue date;
 - ✓ Pre-proposal conference and/or walk-through dates (if required);
 - ✓ Deadline for receipt of written questions;
 - ✓ Deadline for issuance of State's written responses to questions;
 - ✓ Proposal submission deadline;
 - ✓ Oral presentations/interviews, if required; and
 - ✓ Tentative contract award date.

The rest of the RFP document is divided into six main parts:

- Section 1, Project Overview and Instructions, gives a brief overview of the project, names a single point of contact, and includes specific instructions on how to submit a response.
- Section 2, Standard RFP Information, contains information that covers the legal as well as the RFP process issues.
- Section 3, Scope of Project, is the core of the RFP. This is where the “scope” of the project and the specifications are detailed.
- Section 4, Offeror Qualifications, is where the specific qualifications necessary for the project are set out.
- Section 5, Cost Proposal, contains information on how much money is available for the project and/or sets out how the offeror must present its cost proposal.
- Section 6, Evaluation Criteria, states the evaluation criteria and their relative importance.

Appendix A, Standard Terms and Conditions, contains the “boilerplate” terms and conditions that apply to the solicitation and the eventual contract.

Appendix B, Contract, contains the terms and conditions that apply to the RFP and will form the basis of the resulting contract.

WHY SO MANY SUBSECTIONS?

Within each section, are numerous subsections. We are often asked why there needs to be so many subsections. Agencies must remember that the RFP is the beginning of a contract. For this reason, the RFP is written in a point-by-point manner. This is the same format commonly utilized for contracts. The subsections are a simple way to direct offerors to specific parts of the document and eliminate potential points of confusion. It is possible to condense several of the subsections, but it is important to keep in mind that each subsection represents a unique point that may or may not become a focal point of the document.

SECTION 1: PROJECT OVERVIEW AND INSTRUCTIONS

1.0 Project Overview

This subsection contains a brief narrative of agency/program missions, purpose, etc., in issuing an RFP;

- What the agency hopes to achieve through the RFP process;
- In general terms, agency's intents, goals and desires;
- In general terms, what the contractor will be required to do; and
- Why the agency is soliciting proposals.

1.1 Contract Term

- Term/duration of contract; and
- Renewal options.

1.2 Single Point of Contact

- The purpose of naming one contact person, usually the procurement officer who issues the RFP, is to:
 - ✓ Ensure that all questions will be routed through one person;
 - ✓ Provide the same information to all offerors;
 - ✓ Eliminate confusion such as "Well, someone else said I could do it this way"; and
 - ✓ Inform potential offerors that they may not contact members of the evaluation committee or agency staff.
- Provide the department and phone number where the contact person works; and
- Provide a fax number and e-mail address where questions can be sent.

1.3 Required Review

This subsection instructs offerors to carefully review the RFP and submit any questions to the procurement officer by a certain date.

- Offerors must notify the State of any ambiguity, inconsistency or error they may find.
- Questions. Things to keep in mind concerning questions posed by offerors following the release of an RFP:
 - ✓ Questions must be marked as such and identify the RFP number;
 - ✓ Establish a deadline beyond which questions will not be accepted;
 - ✓ Formal responses are posted on the State's website on or before close of business on the date stated;
 - ✓ Note that verbal answers from anyone are not legally binding.
- Addenda.
 - ✓ Any changes or corrections to the original RFP or any other information that will affect the complexion of the award must be disseminated in the form of an addendum.

- ✓ Addenda must also be posted on the State's website.

This subsection also provides information to offerors concerning standard terms and conditions, the standard contract and mandatory requirements.

1.4 Pre-Proposal Conference

This subsection contains instructions to the offeror governing the proposal submittals.

- Pre-proposal conference and walk-through (if required).
 - ✓ List the date, time, and place of the pre-proposal conference; and
 - ✓ State if the event is optional or mandatory (if mandatory, a sign-in sheet is required).

1.5 General Requirements

This subsection has standard "statements of understanding" that the offeror needs to agree to:

- Offerors are advised to notify the State of any terms and conditions that preclude them from responding or add unnecessary cost;
- The RFP, any addenda, the offeror's response, any best and final offers, and clarifications are included in the resulting contract;
- Advises offerors that they must meet the intent of all mandatory requirements;
- The offeror agrees to an understanding of and compliance with the specifications and requirements of the RFP;
- The highest scoring offeror will be the prime contractor and is responsible for any subcontractors
- The State has the right to approve all subcontractors;
- Proposals must be signed in ink; and
- The offeror's response will be valid for a stated period of time. The usual RFP time period is 120 days, but this may be adjusted to best suit the needs of the agency.

1.6 Submitting a Proposal

This subsection provides specific information on how to submit proposals noting:

- Point-by-Point Response.
 - ✓ Specify the exact format you would like the offerors to use to prepare their response to the RFP. For example, indicate where you want qualifications, resumes, price, etc., located throughout the document.
 - ✓ The specified format will assist committee members in locating certain information within each response.
 - ✓ It requires the offeror to acknowledge that they have read and will comply with all sections of the RFP.
 - ✓ It gives notice of consequences that may result from non-compliance or failure to provide all necessary information with the RFP response.

- Failure to Comply with Instructions.
 - ✓ Offerors are notified that failure to comply with instructions may be subject to point deductions.
- Multiple proposal responses (optional).
 - ✓ The project may lend itself to several solutions. This option allows the offeror submit multiple solutions for the committee to evaluate without jeopardizing or confusing one solution for another.
- RFP Price Sheet or Pricing Scenario (optional).
 - ✓ Used in instances where costs are represented in a specific format or for ease of response comparison. A Sample Price Sheet and Pricing Scenario Samples are included on pages 40 and 41.
- Copies Required and Deadline for Receipt of Proposals.
 - ✓ How many copies are required, i.e., “one original and four copies.” (The number of copies should include one copy for each member of the evaluation committee, plus one copy is reserved for public inspection. The original is retained by the SPB);
 - ✓ Location, date, and time for return of proposals;
 - ✓ Include a statement that electronic or fax submittals of the RFP response are not acceptable.
- Late Proposals.
 - ✓ Regardless of cause, late proposals will not be accepted and will automatically be disqualified from further consideration. It is the offeror’s sole risk to assure delivery at the receptionist's desk at the designated office by the designated time. Late proposals will not be opened and may be returned to the offeror at the expense of the offeror or destroyed if requested.

1.7 Cost of Preparing a Proposal

This subsection advises offeror that:

- Costs of preparing the proposal and possible presentations are the responsibility of the offeror;
- All materials submitted to the State become the property of the State;

SECTION 2: RFP STANDARD INFORMATION

2.0 Authority

This subsection sets out the legal authority for issuing an RFP.

2.1 Offeror Competition

This subsection provides a statement encouraging free and open competition and states that the offeror's signature on the RFP guarantees that no collusion has occurred.

2.2 Receipt of Proposals and Public Inspection

This subsection advises offeror that all information received in response to an RFP is deemed public information with few exceptions.

- ✓ The procurement officer is responsible for reviewing the proposals and separating out any information that is protected from public disclosure.

2.3 Classification and Evaluation of Proposals

This subsection contains information concerning how proposals will be evaluated and how contract award will be made as follows:

- Initial Classification;
- Determination of Responsibility;
- Evaluation;
- Completeness of Proposals;
- Achieving Passing Score (optional);
- Opportunity for Discussion/Negotiation and/or Oral Presentation/Product Demonstration;
 - ✓ This subsection notifies offerors that further presentations may be required prior to final selection. Costs of presentations are the offeror's responsibility.
- Best and Final Offer;
- Evaluation Committee Recommendation for Contract Award;
- Request for Documents Notice;
- Contract Negotiation;
- Contract Award.

2.4 State's Rights Reserved

This subsection contains a statement concerning the State's rights to:

- Cancel or terminate the RFP;
- Reject any or all proposals received;

- Waive any undesirable, inconsequential, or inconsistent provisions of the document; and
- Not award, or if awarded, terminate any contract for lack of funds.

SECTION 3: SCOPE OF PROJECT

This section is the core of the RFP. It can also be entitled Statement of Work. It delineates in detail what the agency is seeking the offeror to include in their proposal in terms of the specifications and requirements necessary for the project.

Be sure to include the following items in the specifications:

- **Agency's Duties and Responsibilities**
 - ✓ What will the agency provide the contractor – guidance, oversight, office space, telephone, computers, copies, etc.
 - ✓ How often will the agency pay? Will it be based on the percentage of work completed?
 - ✓ Name the liaison for the agency.
 - ✓ Describe how the agency will monitor the ongoing performance of the contractor.
 - ✓ How will problems be communicated and resolved?
- **Contractor's Duties and Responsibilities**
 - ✓ Provide complete and specific description of the work to be performed.
 - ✓ Describe regulations and laws the contractor must follow.
 - ✓ Describe any forms the contractor must use.
 - ✓ Specify what to do in the event third parties or subcontractors are involved.
 - ✓ List deliverables, performance standards, timelines, etc.
 - ✓ Describe reporting requirements.
 - ✓ Describe sanctions for non-compliance with contract (forfeiture of contract security, liquidated damages, cancellation of contract).
- **Separation of Duties**
 - ✓ Describe any overlapping duties and responsibilities between agency and contractor.
 - ✓ Describe how contractor's scope of duties may be impacted by work that needs to be performed by the State.

TIPS FOR WRITING SPECIFICATIONS

*“Don’t write to be merely understood;
write so that you cannot possibly be misunderstood.”
-- Robert Louis Stevenson*

- Strive for clarity – use plain and simple language.
- Use layman’s terms – avoid industry jargon.
- Use affirmative action words only if you mean them such as “will, shall, must”;
- Don’t use “would, should, may, or please.”
- Do not use the term “bidder” or “contractor.” An RFP is not a bid, and Montana law refers to people responding to RFPs as “offerors.”
- Tell the offerors exactly what you want – if specifications are too open-ended, offerors may come back with 15 different scenarios when only one is needed.
- Don’t leave room for speculation/interpretation by the offeror – you’re likely to get 80 pages of questions during the question and answer period.
- Don’t make the offerors re-invent the wheel – give them all of the pertinent data that you are aware of.
- Be careful to avoid unnecessarily restrictive specifications that could unfairly eliminate some offerors.
- Look ahead to the contract that will be executed. Anticipate potential problems or pitfalls and write the specifications to address and/or avoid them. Ask offerors what problems they anticipate for the project. Address the level of interaction/oversight you anticipate for the project and the performance standards you expect.

SECTION 4: OFFEROR QUALIFICATIONS

4.0 State's Right to Investigate and Reject

The State may make such investigations as deemed necessary to determine the ability of the offeror to supply the products and perform the services specified. The State reserves the right to reject any proposal if the evidence submitted by, or investigation of, the offeror fails to satisfy the State that the offeror is properly qualified to carry out the obligations of the contract. *This includes the State's ability to reject the proposal based on negative references.*

4.1 Offeror Informational Requirements

This section will determine the offeror's capabilities to provide the product and/or complete the project. The RFP must be very specific about what information the agency is seeking concerning qualifications.

4.1.1 References

- Note how many references must be supplied;
- Request the names and phone numbers for contact persons for each reference; and
- Specify if you would like public or private sector references.

4.1.2 Resumes/Company Profile and Experience

- Request pertinent information regarding company experience and/or staff qualifications;
- Request that the offerors identify previous projects they have completed of a similar nature;
- Request a list of staff people who will be working on the project, including the team leader;
- Request resumes for staff people involved in the contract;
- Specifically ask if the staff will be assigned full-time or not to the project; and
- Request a contingency plan in case key personnel become unavailable.

4.1.3 Method of Providing Services

- Ask for description of the work plan and methods to be used to accomplish the work; and
- Request a schedule of deliverables or a detailed timeline for project completion.

4.1.4 Financial Information

- Financial statements, quarterly reports, audit statements, etc.
- Should be requested in very limited circumstances.
- Should be reviewed and/or evaluated by qualified financial experts.

Ask the SPB for assistance with questions concerning this issue.

SECTION 5: COST PROPOSAL

In this section it is beneficial to the agency to include the estimated budget for the project so the offeror can provide a realistic cost proposal within that range.

This is where the agency would include information on how it wants the costs to be presented for this proposal.

If there is a maximum budget available that *cannot* be exceeded, state it here. A response cannot be disqualified for exceeding a budget ceiling unless it is so stated.

SECTION 6: EVALUATION CRITERIA

6.0 Evaluation Criteria

Include the list of criteria that will be used to score the proposals and corresponding point assignments. A list of commonly used criteria is set out in the Request for Proposal Process section of this manual.

APPENDIX A: STANDARD TERMS AND CONDITIONS

Contains the “boilerplate” terms and conditions that apply to the solicitation and the eventual contract.

APPENDIX B: CONTRACT

A contract should be attached to the RFP that reflects all the conditions and terms of the RFP. A contract is attached to the SPB's RFP Template. It is available on the GSD website at: <http://discoveringmontana.com/doa/gsd/procurement/rfpprocess.asp>.

OPTIONAL SPECIFICATIONS

The following sections need to be tailored to fit each RFP. Some of the sections will not be necessary for all RFPs. Standard statements are available on the General Services Division's website for each of these sections at:
<http://discoveringmontana.com/doa/gsd/procurement/standardcontractlanguage.asp>.

Definitions

This subsection will ensure that all parties understand the terminology employed by:

- Eliminating possible equivocation of terms; and
- Eliminating cumbersome and redundant use of phrases/titles.

Prevailing Wage

By law, all bid specifications and contracts for public works projects in excess of \$25,000 must contain a provision stating the standard prevailing wage rate and benefits that must be paid. (Mont. Code Ann. § 18-2-422.) Standard "Prevailing Wage Requirements" language is available on the GSD website at:

<http://discoveringmontana.com/doa/gsd/procurement/standardcontractlanguage.asp>.

Contractor License and Registration

Construction contracts exceeding \$2,500 require the contractor to be registered with the Department of Labor and Industry prior to contract execution. (Mont. Code Ann. § 39-9-401.) Standard "Contractor Registration" language is available on the GSD website at:

<http://discoveringmontana.com/doa/gsd/procurement/standardcontractlanguage.asp>.

Contractor Withholding

Section 15-50-206, MCA, requires the state agency or department for whom a public works construction contract over \$5,000 is being performed, to withhold one percent (1%) of all payments and to transmit such monies to the Department of Revenue.

Standard "Contractor Withholding" language is available on the GSD website at:

<http://discoveringmontana.com/doa/gsd/procurement/standardcontractlanguage.asp>.

SHORT FORM RFP TEMPLATE

The State Procurement Bureau has developed a Short Form RFP Template for agencies to use when working with smaller projects where a less sophisticated response is necessary. Offerors use a simplified RFP response form to respond to the RFP. The Short Form RFP Template is posted on the GSD website at the following address: <http://discoveringmontana.com/doa/gsd/procurement/rfpprocess.asp>.

IT RFP TEMPLATE

The State Procurement Bureau in conjunction with the Information Technology Services Division (ITSD) has developed an IT RFP Template for agencies to use when soliciting information technology projects. The IT RFP Template is posted on the GSD website at the following address:

<http://discoveringmontana.com/doa/gsd/procurement/rfpprocess.asp>.

ADDITIONAL RFP TOOLS

A Sample Price Sheet and Price Scenarios are provided as examples of methods that could be used to determine the price/cost for the supplies/services requested in the RFP process. These methods may be used separately or in combination to obtain price/cost information. Also provided are two Sample Evaluation Matrices or Scoring Sheets that can be tailored as necessary to meet an agency's needs.

SAMPLE PRICE SHEET

COMMUNITY REINTEGRATION OF HARD-TO-PLACE JUVENILE OFFENDERS

Complete the following pricing information, broken down by components of the total cost.

	Annual		Annual
Revenues:		Equipment	
Program Costs:		Vehicles	
Capital Outlay:		Telecommunications	
Debt Service		Data Processing	
Bonds		Sub-Total	
Loans			
TOTAL			
Personal Services, Salaries		Total Operating Expenses	
Administration		External Support	
Security		Subcontracted (Detail)	
Personnel Wages			
Personnel Benefits			
Training			
Medical			
Dental			
Mental Health			
Transportation			
Sub-Total		Sub-Total	
Operations		Other (detail)	
Training			
Transportation			
Supplies and Materials			
Client Health Services			
Medical			
Dental			
Mental Health			
Client Representation			
Legal Representation			
Contract Services			
Other (detail)			
		Sub-Total	
		GRAND TOTAL	
Sub-Total		Offender Cost Per Day (Total Expenditures divided by number of offenders divided by 365 days = Cost Per Day)	

PRICING SCENARIO EXAMPLES

HELICOPTER NETGUNNING SERVICES

The State of Montana, Department of Fish, Wildlife and Parks (FWP) is seeking a contractor to provide aircraft, pilot(s) and personnel for the capture, marking, transport and release of big game animals (primarily bighorn sheep, deer, elk, moose, antelope, mountain goat and wolf) on an occasional, "as needed" basis. The topography and vegetative conditions will vary from heavily timbered, mountainous terrain to sagebrush, grasslands and river breaks.

The project includes the capture of designated animals with a net fired from a hand held net gun. Agency personnel, agency contracted veterinarian and/or qualified contractor personnel may inoculate the captured animals; blood and fecal samples will be obtained. Captured animals will be marked by ear tagging and/or affixing telemetric radio collars or neckbands, and then released on site or transferred to FWP vehicles for transport to other locations. Captured animals will be handled in the most efficient and humane method possible to minimize their physiological stress. Such handling will include blind-folding, removal from the net as soon as possible, and hobbling. FWP will determine the method of slinging the captured animals for transport depending on the species of animal and distances of transport. For elk and deer, slinging by the legs will not be used for distances greater than ½ mile. All transport of sheep, goats, moose antelope and wolves will be accomplished with slinging bags that keep head in upright position or animals may be transported inside the helicopter. Contractor will ensure that any animal injured or killed during the capture operation will be immediately transported to the FWP field base of operations. Decisions as to euthanizing injured animals will be made by FWP. Contract may include air taxi or point-to-point transportation of FWP personnel but only when the project cannot be accomplished in any other way.

Based on the information provided above, please provide a fee schedule on a per animal captured, or per hour basis, for each type of animal and type of terrain that includes all anticipated costs, including personnel and miscellaneous expenses.

EXAMPLE:

The cost to perform all the requested services for one big horn sheep in mountainous terrain would be \$____/animal.

The cost per hour to perform all the requested services involving deer in heavily timbered terrain would be charged at a rate of \$____/hour.

LEGAL TRANSCRIPTION STENOGRAPHER SERVICES

The Department of Administration requests that your firm provide legal transcription stenographer services at a public hearing to be held in Plentywood, Montana. The hearing is scheduled from 9 a.m. to 5 p.m. on Tuesday and Wednesday, March 18 and 19, 2003, with an hour's lunch break from 12 noon to 1 p.m. Please provide a detailed listing of your costs to provide these stenographer services, including travel, lodging and per diem for the following two scenarios:

Scenario 1: One person travels to Plentywood, Montana, records the hearing and provides one original 30-page verbatim transcript of the proceedings and one computer

diskette containing the transcript in Microsoft WORD format to the Department of Administration. Please submit a detailed sample invoice for all associated costs.

Scenario 2: One person travels to Plentywood, Montana, and records the hearing. However, the Department of Administration decides it will not need a transcript of the hearing. Please submit a detailed sample invoice for all associated costs.

SAMPLE SCORING MATRICES

Scoring Matrix
Adult Non-Medicaid Mental Health Care
RFP03-720P
_____ (Vendor Name or Master)

[illegible]

Criteria	Section	Possible Points	Assigned Points	Comments
<i>(Use attached Scoring Guide for 25 points)</i> <ul style="list-style-type: none"> Number of required data variables that will be submitted from list in Appendix C. 71-76 variables - 25 points 63-70 variables - 15 points 0-62 variables - 5 points		25		
Experience in providing 24-hour per day emergency telephone service currently and in FY 2002 <ul style="list-style-type: none"> History and Scope of service <i>(Use attached Scoring Guide for 25 points)</i> <ul style="list-style-type: none"> Number of clients served (current and FY02 combined) 100-200 clients - 25 points 51-99 clients - 15 points 0-50 clients - 5 points	4.1.2.7	50 25 25		
Method of providing service – work plan <ul style="list-style-type: none"> Description of what services will be provided <i>(Use attached Scoring Guide for 60 points)</i> <ul style="list-style-type: none"> Description of timeframes <i>(Use attached Scoring Guide for 60 points)</i> <ul style="list-style-type: none"> Description of how work will be accomplished <i>(Use attached Scoring Guide for 80 points)</i>	4.1.3	200 60 60 80		

Criteria	Section	Possible Points	Assigned Points	Comments
Proposed service area <ul style="list-style-type: none"> Number and list of counties that will be served 22+ counties - 100 points 18-21 counties - 80 points 14-17 counties - 60 points 10-13 counties - 40 points 1-9 counties - 20 points Note overlapping counties with another offeror's proposal in comments column. (To be considered in Stage Two.)	4.1.3	100		
Total Possible Points Offerors must obtain a passing score of at least 650 points in order to be considered for Stage Two of the evaluation.		900		

Stage Two Evaluation. All proposals that obtain at least 650 points in Stage One Evaluation will be considered for contract award based on the areas of proposed service. If more than one offeror scores at least 650 points in a particular proposed service area, the contract will be awarded to the highest scoring offeror in that proposed service area.

RFP SCORING GUIDE

A maximum total number of points available will be set out in the RFP's evaluation criteria section. Each category of evaluation criteria will be broken down further with points assigned to each. In awarding these points, please consider the following guidelines:

Superior Response (95-100%): A superior response will be a highly comprehensive, excellent reply that meets all of the requirements of the areas within that category. In addition, the response covers areas not originally addressed within the RFP category and includes additional information and recommendations that would prove both valuable and beneficial to the agency. This response is considered to be an excellent standard, demonstrating the offeror's authoritative knowledge and understanding of the project.

Very Good Response (85-94%): A very good response will provide useful information, while showing experience and knowledge within the category. The proposal is well thought out and addresses all requirements set forth in the RFP. The offeror provides insight into their expertise, knowledge and understanding of the subject matter.

Good Response (75-84%): A good response meets all the requirements and has demonstrated in a clear and concise manner a thorough knowledge and understanding of the subject matter. This response demonstrates an above average performance with no apparent deficiencies noted.

Fair Response (65-74%): A fair response meets the requirements in an adequate manner. This response demonstrates an ability to comply with guidelines, parameters, and requirements with no additional information put forth by offeror.

Poor Response (60-64%): A poor response minimally meets most requirements set forth in the RFP. The offeror has demonstrated knowledge of the subject matter only.

Failed Response (0-59%): A failed response does not meet the requirements set forth in the RFP. The offeror has not demonstrated knowledge of the subject matter.

Score	100 point scale	80 point scale	60 point scale	50 point scale	25 point scale
Superior	95-100	76-80	57-60	47-50	24-25
Very Good	85-94	68-75	51-56	43-46	22-23
Good	75-84	60-67	45-50	38-42	19-21
Fair	65-74	52-59	39-44	33-37	16-18
Poor	60-64	48-51	36-38	30-32	14-15
Failed	0-59	0-47	0-35	0-29	0-13

**EARLY CHILDHOOD PUBLIC AWARENESS
AND ENGAGEMENT CAMPAIGN
RFP04-784J
Scoring Matrix**

The evaluation committee will review and evaluate the offers according to the following criteria based on a **maximum of 200 total points**. If deemed necessary, the State may request additional information to determine an offeror's ability to provide the services. **Note: Points will be assigned based on the attached Scoring Guide.**

Offeror Name: _____

Points Awarded: _____

Category	Section	Possible Points	Points Awarded	Comments
EXPERIENCE	See Table Below			
A. Description of Purpose or Goals	4.1.1	5		
B. Description of Services Provided	4.1.1	5		
C. Staff Resumes	4.1.1	10		
D. Narrative Describing Experience	4.1.1	5		
E. Letters of Support	4.1.1	5		
F. Samples of Past Work	4.1.1	10		
G. Staff Qualifications	4.1.1	10		
REFERENCES	References Provided = Pass; References Not Provided = Fail			
A. References	4.1.2	Pass/Fail		
SUMMARY	See Table Below			
A. Principal Features of Proposal	4.1.3	10		
B. Offeror's Strengths	4.1.3	10		
DESCRIPTION OF SERVICE DELIVERY/WORK PLAN	See Table Below			
A. Offeror's Methods	4.1.4	30		
B. Offeror's Work Plan	4.1.4	30		
EVALUATION PLAN	See Table Below			
A. Offeror's Method for Collection	4.1.5	10		
B. Narrative	4.1.5	10		
ADMINISTRATION				
A. Offeror General Information	4.1.6	Pass/Fail		
RESOURCES/SUPPORT	See Table Below			
A. Staffing	4.1.7	10		
B. Additional Support	4.1.7	5		
C. Coordination/Subcontract Agreements	4.1.7	5		

BUDGET PROPOSAL	See Table Below			
	-whether the budget categories are appropriate and acceptable for performance; and -whether the sums designated in the budget are appropriate for the various particulars of performance			
A. Budget Narrative	5.1	30		
B. Financial Officer	5.1	Pass/Fail		

SCORING GUIDE

Superior Response (95-100%): A superior response will be a highly comprehensive, excellent reply that meets all of the requirements of the areas within that category. In addition, the response covers areas not originally addressed within the RFP category and includes additional information and recommendations that would prove both valuable and beneficial to the agency. This response is considered to be an excellent standard, demonstrating the offeror's authoritative knowledge and understanding of the project.

Very Good Response (85-94%): A very good response will provide useful information, while showing experience and knowledge within the category. The proposal is well thought out and addresses all requirements set forth in the RFP. The offeror provides insight into their expertise, knowledge and understanding of the subject matter.

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Fair Response (65-74%): A fair response meets the requirements in an adequate manner. This response demonstrates an ability to comply with guidelines, parameters, and requirements with no additional information put forth by offeror.

Poor Response (60-64%): A poor response minimally meets most requirements set forth in the RFP. The offeror has demonstrated knowledge of the subject matter only.

Failed Response (0-59%): A failed response does not meet the requirements set forth in the RFP. The offeror has not demonstrated knowledge of the subject matter.

Score	5 point scale	10 point scale	30 point scale
Superior	5	9-10	26-30
Very Good	4	7-8	20-25
Good	3	5-6	15-19
Fair	2	3-4	10-14
Poor	1	1-2	5-9
Failed	0	0	0-4

FOR MORE INFORMATION...

For more information or assistance regarding the RFP process:

1. Call the Montana State Procurement Bureau at (406) 444-2575.